FIELD DEVICE MANAGER
RELEASE 511

Migration User's Guide
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ABOUT THIS DOCUMENT

This document describes the FDM Migration Tool, explains how to use it, and provides information about the data migration process.

1.1 References

The following list identifies all documents that may be sources of reference for material discussed in this publication.

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<tr>
<td>FDM Installation and Configuration Guide</td>
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<tr>
<td>FDM User's Guide</td>
</tr>
</tbody>
</table>
Before you begin

The FDM Migration Tool allows you to migrate the FDM system configuration and resource data from the earlier versions of FDM to the current version, FDM R511.1.

The FDM Migration Tool ensures that critical data that you have added to the FDM system over a period of time, such as network configuration settings, FDM settings, FDM users and groups, display filters, history records, DDs, are still available when you migrate to FDM R511.1. The migration is fully automated using this tool; minimal manual intervention is required.

**WARNING**

As of FDM R511 offline templates will be supported for

The migration process ensures that most of your critical data is migrated from the older version to the newer version. However, if you are migrating from some specific releases, you must manually add some of the resources to FDM R511.1. The details are mentioned in Migration_planning.

The migration to R511.1 involves the following high-level steps.

- Backing up data from previous releases
- Completing the pre-migration validation tasks
- Performing the migration
- Completing the post-migration tasks

## 2.1 Supported migration paths

FDM R511.1 supports the following migration.

- FDM R501 to FDM R511.1
- FDM R500 to FDM R511.1
- FDM R450 to FDM R511.1
- FDM R440 to FDM R511.1

## 2.2 FDM compatibility with the Experion releases

FDM R511.1 is compatible with the following Experion releases:
- Experion R511.1
- Experion R510.2
- Experion R501.4
- Experion R500.2

FDM R511.1 is compatible with the following Sentinel release:
- R520.2.

2.3 Supported operating systems

FDM R501.1 supports the following operating systems.
- Windows 7 Professional SP1 64-bit or higher
- Windows 10 Professional or higher 64-bit
- Windows Server 2008 R2 SP1 Standard 64-bit
- Windows Server 2016 Standard 64-bit

2.4 Migration planning

Before you start the migration, plan for the following:
- Back up FDM data using FDM Data Backup-Restore utility from the previous version of the FDM Server that you want to migrate.
- Save backup data in a remote disk or storage media such as a flash drive if you want to use the same server computer to install a new operating system.
- Install the necessary operating system. For the supported operating systems, refer to Supported operating systems.
- Install the FDM R511.1 Server.

The following resources can be migrated from previous supported versions of FDM to FDM R511.1.
- Network configuration settings
- FDM settings
- FDM users and groups
- Device documents
- Device filters
- Display filters
- Templates migration (FDM defined templates migration)
- R410.1/R511.1–specific DDs Migration
- History records
- FDM database

The following resources cannot be migrated from the previously supported versions of FDM to FDM R511.1 and you can manually add them to FDM R511.1.
- FDM License: After FDM R511.1 installation, you must import the license, since the FDM license is not available from the previously supported versions of FDM. For more information about importing the FDM license, refer to the section, Updating the FDM license in FDM User’s Guide.
• Attached applications: If you want to use any application used in a previously supported version of FDM, attach it manually in FDM R511.1. For more information about attaching applications, refer to the section, About FDM applications in FDM User’s Guide.

• DD/DTM settings: If you want DD/DTM settings similar to the ones you had selected in the previously installed version of FDM, manually select the DD/DTM settings in FDM R511.1. For more information about DD/DTM settings, refer to the section, Customization of DDM settings in FDM User’s Guide.

• DTM Library: After FDM R500.1 installation, update the DTM library in each node to view the removed or newly installed DTM revisions. For more information about updating DTM library, refer to Updating the DTM library in FDM User’s Guide.

• Deleted DDs: During FDM R511.1 installation, all the DDs pertinent to FDM R511.1 are installed irrespective of whether they are deleted in FDM R500/R450/R440/R430/R410. Hence, the DDs deleted in the earlier version of FDM may be still available in the installed FDM R511.1.

2.4.1 Guidelines for data migration

Before you start the data migration process using the FDM Migration Tool, verify/complete the following:

• Ensure that the FDM R501.1 nodes (FDM Server, FDM Client, FDM RCI, and so on) are installed.

Upgrade Experion nodes particularly Experion Server and ACE before installing any FDM component.

• Save backup data to a local hard disk. If this is not possible, save the backup data in a computer on the same network as the FDM Server.

• Stop the FDM Server.

• (If using Experion) Before the migration, delete the FDM Gateway along with devices from the Monitoring side of Experion Control Builder.

• (If using Experion) Before starting FDM migration on the Experion Server/Control Builder node, check for active locks for the FDM Gateway and Gateway EE blocks in ERDB. Remove any active locks that are present before proceeding with FDM installation on the corresponding node.

2.4.2 Considerations for migrating FDM on Experion nodes

For FDM migration on Experion nodes, consider and follow these tasks in the recommended order.

1. Perform Experion migration before any current FDM components are installed.
2. Remove all FDM patches if installed on older version of FDM.
3. Remove the older version of FDM.
4. Check for the compatible version of FDM with Experion.
5. Install the compatible version of FDM with current Experion version.

If migrating Experion Flex Station that has FDM Station Maintenance View, manually configure the relationship between the FDM Server and the Experion Server in an XML file. For more details, refer to the section Configuring relationship between Experion Server and FDM Server in FDM Installation and Configuration Guide.

If migrating Experion ACE node that has Mux Monitoring Solution, update the already installed device types for mux monitored devices from the FDMLib Library using the FDM Tag Builder. For more details, refer to Post Migration Tasks
Migrating data from FDM R440 to FDM R511.1

The FDM Migration Tool is deployed as part of the FDM R511.1 Server installation. To migrate data from FDM R440 to FDM R511.1, you must provide the FDM R440 backup data as an input to the FDM Migration Tool and this backup data is migrated to the FDM R511.1 format.

Ensure that you have both read and write access for the folder that contains the backup dataset.

The FDM Migration Tool cannot migrate some of the resources from FDM R440 to FDM R511.1. However, you need to manually add those resources to FDM R511.1. The details are mentioned in the Migration planning section.

Migrating data from FDM R440 to R511.1 involves the following high-level operations.

1. Backup FDM R440 Server data using the FDM Data Backup-Restore utility.
2. [Optional] If the FDM Server is installed on an Experion ACE node, perform Experion migration.
3. Remove FDM R440 in all nodes where it is installed.
4. Install FDM R511.1 in all nodes where the earlier FDM version was removed.
5. From the FDM Migration Tool, select the backup dataset.
6. Validate the pre migration tasks.
7. Perform the migration.
8. Perform the post migration tasks.

Before data migration, all installed FDM R440 components along with FDM Server are removed; only then are the required FDM R511.1 components installed.

3.1 To migrate data from FDM R440 to FDM R511.1

1. On the FDM R440 Server, backup the FDM data using the FDM Data Backup-Restore utility. For more details about taking backup data, refer to the section Taking a backup of the FDM database section in the FDM R440 User’s Guide.
2. Remove FDM R440 in all nodes. For more details about removing FDM, refer to the section Removing FDM in FDM R440 Software Installation User’s Guide.
3. Install the FDM R511.1 Server. Refer to the section FDM installation in FDM R511 Installation and Configuration Guide.
4. On the FDM R511.1 Server computer, click Start > All Programs > Honeywell FDM, right-click the FDM Migration Tool and then click Run as administrator.
5. The FDM Migration Tool login window appears.

   If you log on to the server computer as any user other than the administrator, and then launch the FDM Migration Tool, you are prompted to provide the administrative
privileges.
Use the logon credentials used for other FDM tools such as FDM Server Management tool.

6. Type the Login Name.
7. Type the Password.
8. Click Login. The Welcome to FDM Migration Tool wizard appears.
9. Click Next. The Select Backup Dataset page appears.
10. Under Select Backup Location, click Browse to select the source location of the backup data. The Browse For Folder dialog box appears.
11. Select the folder where you saved the backup data. The selected folder's path appears in the Location box.
12. Under Select Backup Dataset Version, select the FDM Version as FDM R440 from the Backup dataset version list.
13. Perform steps 9 through 26 provided in To migrate data from FDM R430 to FDM R511.1.
Migrating data from FDM R450 to FDM R511.1

The FDM Migration Tool is deployed as part of the FDM R511.1 Server installation. To migrate data from FDM R450 to FDM R511.1, you must provide the FDM R450 backup data as an input to the FDM Migration Tool and this backup data is migrated to the FDM R511.1 format.

Ensure that you have both read and write access for the folder that contains the backup dataset.

The FDM Migration Tool cannot migrate some of the resources from FDM R450 to FDM R511.1. However, you need to manually add those resources to FDM R511.1. The details are mentioned in the Migration planning section.

Migrating data from FDM R450 to R511.1 involves the following high-level operations.

1. Backup FDM R450 Server data using the FDM Data Backup-Restore utility.
2. [Optional] If the FDM Server is installed on an Experion ACE node, perform Experion migration.
3. Remove FDM R450 in all nodes where it is installed.
4. Install FDM R511.1 in all nodes where the earlier FDM version was removed.
5. From the FDM Migration Tool, select the backup dataset.
6. Validate the pre migration tasks.
7. Perform the migration.
8. Perform the post migration tasks.

Before data migration, all installed FDM R450 components along with FDM Server are removed; only then are the required FDM R511.1 components installed.

4.1 To migrate data from FDM R450 to FDM R511.1

1. On the FDM R450 Server, backup the FDM data using the FDM Data Backup-Restore utility. For more details about taking backup data, refer to the section Taking a backup of the FDM database section in the FDM R450 User’s Guide.
2. Remove FDM R450 in all nodes. For more details about removing FDM, refer to the section Removing FDM in FDM R450 Software Installation User’s Guide.
3. Install the FDM R511.1 Server. Refer to the section FDM installation in FDM R511 Installation and Configuration Guide.
4. On the FDM R511.1 Server computer, click Start > All Programs > Honeywell FDM, right-click the FDM Migration Tool and then click Run as administrator.
5. The FDM Migration Tool login window appears.

   If you log on to the server computer as any user other than the administrator, and then launch the FDM Migration Tool, you are prompted to provide the administrative privileges.
Use the logon credentials used for other FDM tools such as FDM Server Management tool.

6. Type the Login Name.
7. Type the Password.
8. Click Login. The Welcome to FDM Migration Tool wizard appears.
9. Click Next. The Select Backup Dataset page appears.
10. Under Select Backup Location, click Browse to select the source location of the backup data. The Browse For Folder dialog box appears.
11. Select the folder where you saved the backup data. The selected folder’s path appears in the Location box.
12. Under Select Backup Dataset Version, select the FDM Version as FDM R450 from the Backup dataset version list.
13. Perform steps 9 through 26 provided in To migrate data from FDM R430 to FDM R511.1.
Migrating data from FDM R500 to FDM R511.1

The FDM Migration Tool is deployed as part of the FDM R511.1 Server installation. To migrate data from FDM R500 to FDM R511.1, you must provide the FDM R500 backup data as an input to the FDM Migration Tool and this backup data is migrated to the FDM R511.1 format.

Ensure that you have both read and write access for the folder that contains the backup dataset.

The FDM Migration Tool cannot migrate some of the resources from FDM R500 to FDM R511.1. However, you need to manually add those resources to FDM R511.1. The details are mentioned in the Migration planning section.

Migrating data from FDM R500 to R511.1 involves the following high-level operations.

1. Backup FDM R500 Server data using the FDM Data Backup-Restore utility.
2. [Optional] If the FDM Server is installed on an Experion ACE node, perform Experion migration.
3. Remove FDM R500 in all nodes where it is installed.
4. Install FDM R511.1 in all nodes where the earlier FDM version was removed.
5. From the FDM Migration Tool, select the backup dataset.
6. Validate the pre migration tasks.
7. Perform the migration.
8. Perform the post migration tasks.

Before data migration, all installed FDM R500 components along with FDM Server are removed; only then are the required FDM R511.1 components installed.

5.1 To migrate data from FDM R500 to FDM R511.1

1. On the FDM R500 Server, backup the FDM data using the FDM Data Backup-Restore utility. For more details about taking backup data, refer to the section Taking a backup of the FDM database section in the FDM R500 User’s Guide.
2. Remove FDM R500 in all nodes. For more details about removing FDM, refer to the section Removing FDM in FDM R500 Software Installation User’s Guide.
3. Install the FDM R511.1 Server. Refer to the section FDM installation in FDM R511 Installation and Configuration Guide.
4. On the FDM R511.1 Server computer, click Start > All Programs > Honeywell FDM, right-click the FDM Migration Tool and then click Run as administrator.
5. The FDM Migration Tool login window appears.

If you log on to the server computer as any user other than the administrator, and then launch the FDM Migration Tool, you are prompted to provide the administrative privileges.
Use the logon credentials used for other FDM tools such as FDM Server Management tool.

6. Type the Login Name.
7. Type the Password.
8. Click Login. The Welcome to FDM Migration Tool wizard appears.
9. Click Next. The Select Backup Dataset page appears.
10. Under Select Backup Location, click Browse to select the source location of the backup data. The Browse For Folder dialog box appears.
11. Select the folder where you saved the backup data. The selected folder's path appears in the Location box.
12. Under Select Backup Dataset Version, select the FDM Version as FDM R500 from the Backup dataset version list.
13. Perform steps 9 through 26 provided in To migrate data from FDM R430 to FDM R511.1.
The FDM Migration Tool is deployed as part of the FDM R511.1 Server installation. To migrate data from FDM R501 to FDM R511.1, you must provide the FDM R501 backup data as an input to the FDM Migration Tool and this backup data is migrated to the FDM R511.1 format.

Ensure that you have both Read and Write access to the folder that contains the backup dataset.

The FDM Migration Tool cannot migrate some of the resources from FDM R501 to FDM R511.1. However, you need to manually add those resources to FDM R511.1. The details are mentioned in the Migration planning section.

Migrating data from FDM R501 to R511.1 involves the following high-level operations.

1. Back up FDM R501 Server data using the FDM Data Backup-Restore utility.
2. [Optional] If the FDM Server is installed on an Experion ACE node, perform Experion migration.
3. Remove FDM R501 in all nodes where it is installed.
4. Install FDM R511.1 in all nodes where the earlier FDM version was removed.
5. From the FDM Migration Tool, select the backup dataset.
6. Validate the pre migration tasks.
7. Perform migration.
8. Perform post migration tasks.

Before data migration, all installed FDM R501 components along with FDM Server are removed; only then are the required FDM R511.1 components installed.

6.1 To migrate data from FDM R501 to FDM R511.1

1. On the FDM R501 Server, back up FDM data using the FDM Data Backup-Restore utility. For more details about taking backup data, refer to the section Taking a backup of the FDM database section in the FDM R501 User’s Guide.
2. Remove FDM R501 in all nodes. For more details about removing FDM, refer to the section Removing FDM in FDM R501 Software Installation User’s Guide.
3. Install an operating system supported by FDM R511.1
4. Install FDM R511.1 Server. Refer to the FDM installation section in FDM R501 Installation and Configuration Guide.
5. On the FDM R511.1 Server computer, click Start > All Programs > Honeywell FDM, right-click the FDM Migration Tool and click Run as administrator.
6. The FDM Migration Tool login window appears.

If you log on to the server computer as any user other than the administrator, and then launch the FDM Migration Tool, you are prompted to provide the administrative
privileges.
Use the logon credentials used for other FDM tools such as FDM Server Management tool.

7. Type the Login Name.
8. Type the Password.
9. Click Login. The Welcome to FDM Migration Tool wizard appears.
10. Click Next. The Select Backup Dataset page appears.
    Ensure to back up FDM R501 Server data.
11. Under Select Backup Location, click Browse to select the source location of the backup data. The Browse For Folder dialog box appears.
12. Select the folder where you saved the backup data. The selected folder's path appears in the Location box.
13. Under Select Backup Dataset Version, select the FDM Version as FDM R501 from the Backup dataset version list.
14. Click Next. The Pre Migration Validation page appears.
15. In the Pre Migration Validation phase, FDM Migration Tool checks for the following and displays the status of each pre migration task.
    - FDM Server
    - FDM Server State
    - SQL Server
    - SQL Server Integration Services (SSIS)
    - FDM Database
    - File Validation
    - Disk space
16. If all the pre migration tasks are validated successfully, Status is displayed as Passed for each task under the Status column.
17. Click the link in the Status column to view the status description for each pre migration task.
<table>
<thead>
<tr>
<th>Task</th>
<th>If status is Passed, then...</th>
<th>If status is Failed, then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>FDM Server</td>
<td>FDM Server is installed</td>
<td>FDM Migration Tool could not find a valid FDM R511.1 Server. Ensure that the FDM R501.1 Server is installed.</td>
</tr>
<tr>
<td>FDM Server State</td>
<td>FDM Server is stopped (recommended)</td>
<td>Stop the FDM Server and click Retry.</td>
</tr>
<tr>
<td>SQL Server</td>
<td>SQL Server is installed</td>
<td>Microsoft SQL Server 2014 is not installed successfully and hence reinstall the FDM R500.1 Server.</td>
</tr>
<tr>
<td>SSIS</td>
<td>SQL Server SSIS is installed</td>
<td>SQL Server SSIS is not installed successfully and hence reinstall the FDM R511.1 Server.</td>
</tr>
<tr>
<td>FDM Database</td>
<td>FDM database is present in Microsoft SQL Server</td>
<td>Reinstall the FDM R511.1 Server.</td>
</tr>
<tr>
<td>Disk space</td>
<td>Disk space is sufficient to perform migration</td>
<td>An error message appears displaying “Failed to evaluate disk space. Please provide a valid path”. You must clean up the destination and click Retry.</td>
</tr>
<tr>
<td>File Validation</td>
<td>Files required for migration are present in the given location</td>
<td>Go to Select Backup Dataset page and select the location where the migration files are present.</td>
</tr>
</tbody>
</table>

18. Click Next. The Migration page appears. In the migration phase, the following tasks need to be completed.

- Resource Migration
- Database Migration

Resource Migration involves migrating the following resources.

- Device Documents
- Templates Migration (FDM defined templates migration)
- Device Filters (created using FDM HART Multiplexer)
- Display Filters
- Offline Templates
- Migration of specific DDs

19. During resource migration, if the status is indicated as Failed for a migration task, then a message appears asking you for confirmation to proceed with the migration. For example, if migration of Device Filters failed, then its status is marked as Failed and the following confirmation message appears.

![FDM Migration Tool]

Migration task “Device Filters” failed. Do you want to continue with migration?

- Do not prompt on migration task failures and continue with the migration.

20. Click Yes to continue with migration of other tasks or click No to stop the migration and view the Summary page with a summary of the migration process.
Database Migration involves migrating the following tasks.

- Backup Existing Database
- Attach Database
- Transforming Tables

During database migration, if any of the previously mentioned migration tasks fail, migration stops and the Summary page appears.

If all tasks migrated successfully, the status is shown as Passed for each task under the Status column.

21. Click the link in the Status column to view the status description for each migration task.
22. Click Next. The Post Migration page appears.
23. In the Post Migration phase, FDM Migration Tool does the following post migration activities.
   - Copying Files to Destination
   - Removing temporary database
   - Removing temporary files

<table>
<thead>
<tr>
<th>Task</th>
<th>If the status is Passed, then...</th>
<th>If status is Failed, then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copying Files to Destination</td>
<td>Migrated files are copied to destination folder.</td>
<td>Migrated files are not copied to the destination folder.</td>
</tr>
<tr>
<td>Removing temporary database</td>
<td>Old database is removed.</td>
<td>Old database is not removed.</td>
</tr>
<tr>
<td>Removing temporary files</td>
<td>Removed all temporary files.</td>
<td>All temporary files are not removed.</td>
</tr>
</tbody>
</table>

24. After you receive a message Finished post migration tasks, click Next. The Summary page appears. It displays the summary of the migration process and the location where the migration logs are present.
25. Click Finish. A warning message appears to restart the computer. Click OK and then restart the computer.
26. Restart the system after performing the migration.
After the migration, perform the following tasks.

- Import the license file. For more details about importing the license file, refer to the section, Updating the license from the FDM Installation and Configuration Guide.
- Update the DTM library if you have used DTMs in the previously supported FDM version.
- Update the already installed device types from the FDMLib Library using FDM Tag Builder and perform the following for Mux Monitored devices.
  - Backup device types
  - Verify backed up device types using the backup repository
  - Delete device types from the FDMLib Library
  - Export tags

### 7.1 Backing up device types

If migrating FDM, backup device types using these steps.

1. Log on to the FDM Client using appropriate login credentials.
   
   Only a user with an Engineer or an Administrator role assigned with the FDM Tag Builder privilege can access the FDM Tag Builder tool. The tool is not available for Operator and Supervisor roles.

2. Click Library > FDM Tag Builder.

3. The FDM TagBuilder LogIn dialog box appears prompting you to enter Experion login credentials. It enables you to log on to the Experion Server where the FDM Gateways are configured.

4. Enter login credentials for Experion Server and click OK. The FDM Tagbuilder dialog box appears.

5. In the left pane, click CMD 48 Notification. The Command 48 Notifications dialog box appears. It displays the list of HART device types in the FDMLib Library, and Command 48 strings and notification option for the selected device types.

6. Select all the device types and click Backup. A confirmation message appears after backup operation is complete.

7. Click OK. The status of the backup operation is displayed under the Status column for the corresponding selected device type.

   Press <CTRL> + <SHIFT> keys to select multiple device types.

### 7.2 Verifying backed up device types using the backup repository

To verify the backed up device types using Backup Repository, click Backup Repository from the FDM Tagbuilder dialog box. A list of backed up HART device types from the FDMLib, and Command 48 strings and notification option for the selected device types(s) is displayed.

To verify the backup data:
• Select any HART device type.
• Verify the updated Command 48 notification options for the corresponding selected HART device type.
• In the backup repository, for all the device types for which DDs are not available in the migrated FDM system, generic Command 48 strings appear. After you export such device types, proper Command 48 strings start appearing in the backup repository too.

7.3 Deleting device types from the FDMLib Library

To delete device types from the FDMLib Library, perform the following steps.
1. From the FDM Tagbuilder dialog box, click CMD 48 Notification. A list of HART device types in the FDMLib Library, and Command 48 strings and notification option for the selected device types(s) appears.
2. Select all device type(s) and click Delete. A confirmation message appears after the selected device types are deleted.
3. Click OK.
4. Close the FDM Tagbuilder and restart it before exporting the tags.

Before deleting a device type, if an instance of that device type exists in Control Builder, the following message appears.

Open Control Builder and delete all device type(s) and then proceed with the delete operation using the Delete option from Command 48 Notifications dialog box.

Do not delete the FDMHARTDEVICE device type from FDMLib Library from the Command
Notifications dialog box. If you try to delete, the following message appears.

```
FDMHARTDEVICE is a standard Device Type which cannot be deleted.
```

### 7.4 Exporting tags

To export the tags, perform the following steps.

1. From the FDM Tag Builder dialog box, in the left pane, click Export Tags. The Export Tags dialog box appears.

2. The FDM gateways that are configured in Experion using Control Builder appear in the Select FDM Gateway drop-down list, in the right pane. From this list, select the gateway for which you want to export FDM tags. FDM displays all Mux Monitored networks in the tree view.
You can export the tags at the multiplexer network level, multiplexer level, or the device level. For the Experion integrated Safety network, you can export the tags at the network level, SM and IOTA level. However, you can export only RUSIO connected HART devices, but not SMs and IOTAs.

3. Click the Export Tag(s) to ERDB button or through the shortcut menu from multiplexer network/multiplexer/device/SM/IOTA level to export the tags for the selected device type.

4. If any device type is not available in the FDMLib Library in Control Builder, the following message appears before exporting the tags.

5. Click OK. The Command48Information dialog box appears.
6. If device type is available in the backup repository, perform the following:

   a. Select the Pick Command48 Notification options from backup Repository check box.
   b. Select the device type from drop-down list.
   c. Click OK in the Command48Information dialog box or update the Command 48 Notification options as necessary and click OK.

The Pick Command48 Notification options from backup Repository check box is enabled only if device type is available in the backup repository.

For more information about exporting tags, refer to the Mux Monitoring User's Guide.
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